

# CAPPS HR/Payroll & Financials — Combined User Group Meeting Minutes

Tuesday, Jan. 25, 2022

9–11 a.m.

(Webinar Only)

## I. Welcome/Announcements (Andrea Smith)

- User Group meeting materials are posted on FMX.
  - To be added to the user group distribution list, email the CAPPS Governance and Communications team at: [CAPPS.CGC.BA@cpa.texas.gov](mailto:CAPPS.CGC.BA@cpa.texas.gov).
  - This is a combined User Group meeting, so the team is presenting both HR/Payroll and Financials updates today.
  - 2022 is an image and tools upgrade year for CAPPS. Over the next few months, the CAPPS support teams will provide details on the new functionality and changes that the upgrade includes and are planning to give the first demonstration of Time and Labor changes at the User Group in February. Stay tuned for more details on that.
- The CAPPS Training team made the following announcements (Jay Ingram):
  - The CAPPS Financials Instructor-Lead-Training (ILT) courses continue through February. The schedule and registration links are posted on the [CAPPS Training](#) website.
  - Steady state ILT courses will not be offered during March and April due to deployment training activities. Production agency training will pick back up in the summer.
  - Currently, there is no confirmed date for an ILT course on CAPPS Queries but there is a self-paced training available on the [CAPPS Training](#) website. The course is located under the *Financials Self-Paced Training* section but contains general information applicable to both module towers.
  - For additional information about CAPPS Training courses, please visit the [CAPPS Training](#) website or email the team at [CAPPS.Training@cpa.texas.gov](mailto:CAPPS.Training@cpa.texas.gov).

## II. Production Update: Financials Support Requests (SRs) (Anthony Martin)

- **SR Summary and Trend Report**
  - Reviewed the CAPPS Financials Summary and Trend Report 01-25-22 document.
    - In December, there were 59 high priority status tickets and 274 active SRs.
    - There were no critical tickets to report. As shown on the trend chart, there were 398 SRs opened and 429 closed in December.
    - The downward trend for December is due to a decrease in configuration change requests.
- **Governance Approved Enhancements**
  - Reviewed the CAPPS Financials Governance Approved SRs 01-25-22 document. Updates since the last meeting are identified with an asterisk (\*) and bolded.
    - SR 25133 is for the addition of a budget pre-check functionality to the Control Budgets page. This allows Purchase Orders to be pre-checked against open and pending budgets without making any changes to the ledgers. This is listed as a Global configuration not a code change making it voluntary. Agencies that want to use this feature may certainly obtain it to do so, but it is not mandatory for all agencies. This SR is scheduled for migration into Production on Jan. 27, 2022.
    - SR 21611 is an *Accounts Payable* module modification on the EDI program to allow the capture of default values from the EDIPARM System Code table. This prevents agencies from having to conduct manual changes. The scheduled migration date into Production is Jan. 27, 2022.

- **Required Maintenance**

- Reviewed the CAPPS Financials Required Maintenance 01-25-22 document. Updates since the last meeting are identified with an asterisk (\*) and bolded.
  - SR 22873 is *In Work* status with UAT starting Feb. 21 and a Production date of March 30, 2022. This is a modification to assign the USAS effective date as the journal date when generated making for a more accurate update between CAPPS and USAS.
  - SR 18706 adds the option to print deposit slips for local banks. This is *In Development* with UAT starting on Jan. 27, 2022.
  - SR 22547 is for new USAS interface functionality. The functionality allows the USAS status to match for the HX and IN Browser. This SR is *Pending Production Migration* on Jan. 27, 2022.
  - SR 20340 is in *Agency Acceptance Testing* and *Pending Production* on Jan. 27, 2022. This SR adds an “Unarchive” feature to restore transactions that were accidentally/incorrectly archived, meaning agencies no longer need to submit a ticket to restore archived content.

### III. **Production Update: HR/Payroll Support Requests (SRs) (Andrea Smith)**

- **SR Summary and Trend Report**

- Reviewed the CAPPS HR/Payroll Summary and Trend Report 01-25-22 document.
  - There were 735 active SRs with 52 in high priority status in December.
  - As shown on the trend chart, there were 598 SRs opened and 626 closed. The results of the trend are due to with agency CYE tickets.

- **Governance Approved Enhancements**

- The CAPPS HR/Payroll Governance Approved SRs 01-25-22 document was reviewed. Updates since the last meeting are identified with an asterisk (\*) and are bolded.
  - SR 13975 is for the *Recruiting* module to add history tracking to several fields within the Employee Profile page. This SR is *Complete* as of Dec. 16, 2021.

- **Required Maintenance**

- Reviewed the CAPPS HR/Payroll Required Maintenance 01-25-22 document. Updates since the last meeting are identified with an asterisk (\*) and bolded.
  - SR 31175 and 31177 are now *Completed* and went into *Production* Nov. 29, 2021.
  - SR 32905 is *In Work* and will soon be in *UAT*. This is an enhancement for some of the SSN fields within the *Recruit* module. There is an upcoming discussion with more details regarding this SR later in today’s meeting.

### IV. **Upcoming Vote: SRs Submitted to Governance (Shelly Wilder)**

- Reviewed the CAPPS HR/Payroll SRs Submitted to Governance 01-25-22 document.
- SR 6932 is a modification initiated by DPS for the Firearms section within the *HR/Payroll* module. This modification is to change the firearm section’s sort order.
  - The CAPPS Support team recommendations approval for this SR. The vote for this SR will go out shortly after today’s meeting.

### V. **Project Update: CAPPS Fiscal 2022 Financials Agency Deployment Project Dashboard (Nyguel Sanders)**

- Reviewed the CAPPS Fiscal 2022 Financials Agency Deployment Project Dashboard 01-25-22 document.
- The project is green and on track for both the soft go-live date on Aug. 08, 2022 and the implementation date on Sept. 01, 2022.
- Key items:
  - This project is now at 50% completion.
  - Configuration/Prototyping Sessions has started.
  - Security Essentials Meeting is scheduled for Wednesday, Jan. 26, 2022.
  - Train-the-Trainer Kick-off is currently being planned.

**VI. Project Update: CAPPS Fiscal 2022 HR Payroll Agency Deployment Project Dashboard (Diana Urban)**

- Reviewed the CAPPS Fiscal 2022 HR Payroll Agency Deployment Project Dashboard 01/25/22 document.
- The code move date is July 07, 2022. The implementation date is July 11, 2022. The project metrics are on track.
- Key items:
  - This project is now at 43% completion.
  - The Discovery/Gap Analysis, Phase 2 Functional & Technical Design, and Mock 1 conversion are completed.
  - Configuration Prototyping continues.
  - Mock 2 conversion was completed this week.
  - System Test planning is in progress.

**VII. Project Update: CAPPS Fiscal 2022 Recruit Deployment Project Dashboard (Diana Urban)**

- Reviewed the CAPPS Fiscal 2022 Recruit Deployment Project Dashboard 01/25/22 document.
- The project is green and on track.
- Key items:
  - The project is now at 47% completion.
  - Texas Military Department (TMD) went live with the Onboarding module this past November and began using it December 1, 2021.
  - BDO went live with Recruit Dec. 1, 2021.
  - OIEC onboarding module implementation kick off was Dec. 7, 2021; Discovery Sessions are completed; Go-Live is planned for March 29, 2022.
  - The GAP sign-off is completed.
  - Configurations are complete.
  - The Conference Room Pilot (CRP) sessions are underway.
  - UAT prep beginning in January.
  - Early access begins on Feb. 7, 2022.

**VIII. Discussion Topic: Calendar Year-End (CYE) Updates (Danette McWilliams/Marissa Hoffman)**

- As of Jan. 7, all agencies were provided preliminary W-2 totals in the CYE SRs and must submit the CYE Authorization Form to finalize data and start the printing process. If any discrepancies are found, please contact us through the agency's CYE SR.
- W-2s were made available via ESS as of Jan. 14 and printing began Jan. 11 and is ongoing.
- Production Support will transmit the W-2 file to SSA on CAPPS Central agencies behalf by Jan. 31.
- The processing of 1095-C forms began Jan. 18, 2022 and is ongoing at this time. However, it has been delayed due to paper shortages and unavailability of forms. Fortunately, the IRS has provided an extension to March 2, 2022 for agencies/employers to provide employees with the form.
- Agencies will receive an update to their CYE SR when forms are printed and ready at the LBJ Warrant Window. **NOTE:** Warrant Window hours are 8:00–10:00 a.m.
- Production Support will transmit the Affordable Care Act (ACA) file to the IRS on behalf of CAPPS Central agencies by March 31, 2022.
- Starting Feb. 1, the new *Agency Manage Employee 1095-C* forms page goes into Production allowing agencies to retrieve replacement forms. This can be done by added/requesting the new TX\_HCM\_BN\_MAINTAIN\_ACA security role.
  - Navigation to the ACA Forms: From the **Home** page, select **Payroll for North America**, then select **U.S. Annual Processing**, then select **ACA Annual Processing**, and then click on **View Form 1095C**.
- There are quite a few agencies who have forms ready for pick-up at the warrant window, please ensure that whoever is picking up the forms specifically ask for them.

**IX. Discussion Topic: Enhancement to Custom Hire and Hire Candidate SSN Fields (SR 32905) (Shelly Wilder)**

- SR 32905 is an enhancement to the SSN fields on the CAPPs Custom Hire, Recruit RSS, and MSS hire pages. This enhancement will add several SSN verification message boxes throughout the process requiring a confirmation that the information (SSN) in the **National ID** is accurate before proceeding. These validation fields will not have a copy/paste functionality.
- In addition, a warning message also appears as a reminder to not onboard a new/rehire candidate prior to them showing up for their first physical day at work.
- A final prompt appears for reverification that the SSN is accurate before saving the record. If the SSN is not correct, click **Cancel** and it will return to the beginning to make the necessary corrections.
- Once this SR is in production, the application will be updated to reflect the proper process.

**X. Discussion Topic: Time in Needs Approval Clean-Up (Erika Condado-Alvarado)**

- There is a new timesheet/approval process coming this summer (July 1). To prepare for the implementation, a clean-up needs to be conducted for any time entries that are pending approval. The clean-up process has 4 stages:
  - Stage 1: older than 90 days
  - Stage 2: 90 – 60 days
  - Stage 3: 60 – 30 days
  - Stage 4: Current Month
- During Stage 1, agency SRs are opened by the Production Support team to aid in the clean-up for entries older than 90 days and/or terminated employees. The due date for Stage 1 clean-up completion is March 8.
- Stage 2 agency SRs are opened after the completion of Stage 1. Due date is still to be determined.
- Details regarding Stages 3 and 4 will be provided upon completion of Stages 1 and 2.

**XI. Upcoming Meetings**

- Thursday, Feb. 24, 2022 – this is a combined User Group Meeting for both Financials and HR/Payroll.